

Module D, Section 2 Activity

Your employer, John Morris, is a 47-year old man who requires the use of a wheelchair for mobility. He lives alone in an apartment where his rent is fixed at \$375.00 per month. John does not drive but uses public transportation to get around town. John does not like it though, because it does not give much flexibility and the drivers only can take him to Medicaid-approved activities like doctors' offices. He is pretty healthy so he does not need to go to the doctor very often. He receives \$425.00 per month from Social Security. John works part-time for the local disability advocacy center and makes approximately \$200.00 per month, paid every other week. He receives Food Stamp assistance totaling \$110.00 per month. John needs assistance everyday with the activities of daily living. When he has an attendant he likes, his activities take less time, but when he does not like the attendant, it seems to take longer to get things done. John has Medicare (part A & B) and Medicaid, which pays for the bulk of his medical needs and chair repairs. John's neighbor, Jim lives down the hall. Jim runs a bike shop. Jim often helps with minor problems on the John's chair. Jim does it to be nice and because he likes John. However, John hates to ask him because he does not like to bother Jim. Recently, John's seatback was broken for two weeks before he had the courage to ask Jim for help to get it fixed. John has been evaluated for the "My Voice, My Choice" program option and was found to be eligible for \$1500.00. His two main priorities are attendant care and transportation to work.

Your job is to plug in the numbers according to what is currently happening in John's life. As a Support Broker, you will have to identify areas of need (transportation and attendant care), identify resources already available in your community, and brainstorm ways to create providers. What is the cost of public transportation in your town? If you do not know, make some calls to find out. How often do you leave your house on errands, work and such. If you had to pay those rates, what would your budget look like? What is the going rate for mileage reimbursement? Again, if you do not know, check with the IRS office. Budgets can be established for review of daily, weekly, monthly, quarterly expenditures. This one is set for monthly tracking, but if your employer likes to go out to eat often (which might or might not be a problem for her budget) you might want to formulate a weekly budget.

It is important to identify what is budgeted for the expense, and then what is the actual cost. As we alluded to in Module D, some costs fluctuate and you may need to have a range of affordable spending.

| Month of _____ | Budgeted | Expected Costs | Actual Costs | + / - |
|-----------------------|----------|----------------|--------------|-------|
| INCOME SOURCES | | | | |
| Work Income | | | | |
| My Voice, My Choice | | | | |
| SSDI | | | | |
| Other | | | | |
| Other | | | | |
| Income Total | | | | |

Month Continued

| |
|----------------------|
| HOUSING |
| Rent / Mortgage |
| Utilities |
| Cell Phone |
| Computer Access |
| Other |
| Other |
| Housing Total |

[illegible]

| FOOD |
|------------|
| Grocery |
| Restaurant |
| Other |
| Other |
| Food Total |

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| MEDICAL |
|------------------------|
| Prescription |
| Over the Counter |
| Wheelchair Maintenance |
| Other |
| Other |
| Medical Total |

[illegible]

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|------------------|
| ENTERTAINMENT |
| Planned Outings |
| Spur of Moment |
| Other |
| Other |
| Entertain. Total |

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| SERVICES |
|------------------------|
| Support Broker |
| Financial Intermediary |
| Other possibilities |
| Transportation |
| Attendant Care |
| In-home RN/medical |
| Therapy(ies) |
| Therapy(ies) |
| Job Coaching |
| Other |
| Other |
| Other |
| Services Total |

[illegible]